

Appointment Management

Introduction

The Edit Classification action permits you to edit required classifications associated with regular appointments and stand-alone add/edits. The classifications include those questions related to whether or not the treatment was for a service connected condition, or related to Agent Orange/ionizing radiation/environmental contaminant exposure. These questions appear if they are applicable to the patient.

All required classifications must be answered to complete the checkout process. You are not allowed to up-arrow out of these questions unless they are already answered or your site has set the ALLOW '^' OUT OF CLASS. parameter in the Set up a Clinic option (Supervisor menu) to YES.

VA Patient Enrollment System information for the selected patient is displayed while using the following actions:

CI Check In

CO Check Out

MA Make Appointment

Example

Select Patient name or Clinic name: **HANSEN,H**

Searching for a Patient HANSEN,H 02-03-71 123450101 YES
NSC VETERAN SMITH,DR. JAY SMITH,DR. JAY

Appt Mgt Module		Jul 30, 1997 09:10:12	Page: 1 of 1
Patient: HANSEN,H (0101)		Outpatient	
Total Appointment Profile		06/30/97 thru 04/24/00	
Clinic	Appt Date/Time	Status	
1 Ultrasound	Jul 29, 1997 10:30	Action Req/Checked Out 08:03	
2 Ultrasound	Jul 29, 1997 15:30	Cancelled By Patient &	
3 X-ray	Jul 30, 1997 09:00	No Action Taken/Today	
4 Ultrasound	Aug 11, 1997 08:00	Future	

Enter ?? for more actions

CI Check In	PT Change Patient	CO Check Out
UN Unscheduled Visit	CL Change Clinic	EC Edit Classification
MA Make Appointment	CD Change Date Range	PR Provider Update
CA Cancel Appointment	EP Expand Entry	DX Diagnosis Update
NS No Show	AE Add/Edit	DE Delete Check Out
DC Discharge Clinic	RT Record Tracking	CP Procedure Update
AL Appointment Lists	PD Patient Demographics	TI Display Team Information

Select Action: Quit// **CI=3** Check In
 3 X-ray Jul 30, 1997 09:00 No Action Taken/Today
 ...checked in JUL 30, 1997@09:10

Section 2 - Appointment Menu

Appointment Management

Example

Patient is enrolled in the VA Patient Enrollment System...

Enrollment Date : JUL 30, 1997
Enrollment Status : UNVERIFIED
Enrollment Priority: 2
Preferred Facility : HONOLULU OC, HI

Enter RETURN to continue or '^' to exit: <RET>

3 X-ray Jul 30, 1997 09:00 Action Req/Checked In Jul 30, 1997 09:10:12

Appt Mgt Module		Jul 30, 1997 09:10:12	Page: 1 of 1
Patient: HANSEN,H (0101)		Outpatient	
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Enter ?? for more actions

CI Check In	PT Change Patient	CO Check Out
UN Unscheduled Visit	CL Change Clinic	EC Edit Classification
MA Make Appointment	CD Change Date Range	PR Provider Update
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Select Action: Quit// <RET>

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Appointment Check-in/Check-out

Introduction

The Appointment Check-in/Check-out option is used to check in or check out appointments for a selected clinic and date. It may also be used to edit the checked in/out date/time on file for an appointment or delete a checked in date/time when one has been entered in error. If you wish to edit the check out date, use the Check Out Date action on the Checkout Screen.

VA Patient Enrollment System information for the selected patient is displayed during check-in. When using the checkout function, you may be prompted through a checkout interview. Classification, provider, diagnosis, and procedure code information for the selected appointment can be added/updated.

You have the option to display the Checkout Screen through this option. By selecting certain actions, such as Unscheduled Visit, Make Appointment, and Cancel Appointment, you automatically access other scheduling options. When Record Tracking is selected, you automatically access the Record Tracking software.

When processing is completed, you are prompted to select another patient, clinic, or date without having to leave the option.

This option is designed to allow input from either a CRT keyboard or a barcode reader. In order to use the barcode capabilities, the clinic's appointment list must be printed on a device that supports the printing of barcodes. If the patient barcode on the appointment list is missing or unreadable, you may use the record tracking barcode on the patient's medical record.

Appointment Check-in/Check-out

Example

Select Patient name or Clinic name: **HANSEN,H**

Searching for a Patient	HANSEN,H	02-03-71	123450101	YES
NSC VETERAN	SMITH,DR. JAY	SMITH,DR. JAY		

Appt Mgt Module		Jul 30, 1997 09:10:12	Page: 1 of 1
Patient: HANSEN,H (0101)		Outpatient	
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Clinic	Appt Date/Time	Status	
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3 X-ray	Jul 30, 1997 09:00	No Action Taken/Today	
4 Ultrasound	Aug 11, 1997 08:00	Future	

Enter ?? for more actions

CI	Check In	PT	Change Patient	CO	Check Out
UN	Unscheduled Visit	CL	Change Clinic	EC	Edit Classification
MA	Make Appointment	CD	Change Date Range	PR	Provider Update
CA	Cancel Appointment	EP	Expand Entry	DX	Diagnosis Update
NS	No Show	AE	Add/Edit	DE	Delete Check Out
DC	Discharge Clinic	RT	Record Tracking	CP	Procedure Update
AL	Appointment Lists	PD	Patient Demographics	TI	Display Team Information
Select Action: Quit//		CI=3	Check In		
3	X-ray		Jul 30, 1997 09:00	No Action Taken/Today	
...checked in JUL 30,			1997@09:10		

Section 2 - Appointment Menu

Appointment Check-in/Check-out

Example

Patient is enrolled in the VA Patient Enrollment System...

Enrollment Date : JUL 30, 1997
Enrollment Status : UNVERIFIED
Enrollment Priority: 2
Preferred Facility : HONOLULU OC, HI

Enter RETURN to continue or '^' to exit: <RET>

3 X-ray Jul 30, 1997 09:00 Action Req/Checked In Jul 30, 1997 09:10:12

Appt Mgt Module		Jul 30, 1997 09:10:12	Page: 1 of 1
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Select Action: Quit// <RET>

Make Appointment

Introduction

The Make Appointment option allows designated personnel to schedule clinic appointments. It also allows for the booking of ancillary appointments such as lab, x-ray, and EKG. You may have only one entry for each test (i.e., one lab time, one EKG time, one x-ray time). In the case of prohibited clinics (so designated during clinic set-up), only those users with privileged access will be able to book appointments.

Any pending appointments the patient has for the selected clinic and/or other clinics can be displayed. If the patient is not enrolled in the selected clinic, you will have the opportunity to either enroll or schedule the patient for a consultation. You will not be able to make a consult appointment through this option for patients who are designated as “restrict consults” through the Primary Care Management Module (PCMM). If you hold the SC CONSULT security key, you may do this through the Make Consult Appointment option.

With PCMM loaded, when you enroll a patient in a new clinic using this option, a MailMan message will be sent to the applicable team members who chose to receive Team Notifications, if **all** of the following criteria are met.

- The clinic is associated to only one team.
- The patient is not currently enrolled in the team.
- Auto-enrollment for the team must be enabled.
- The team must be open. (Team Closed box not checked.)
- The patient must be a veteran if the team is a Primary Care team.

Numerous messages may be displayed while using this option depending on whether or not the slot requested is available. These include such information as patient already has an appointment on that date/time, clinic does not meet on that date, or appointment can't be made while clinic is inactivated. If an appointment will be an overbook, you are notified and allowed to overbook if so specified in the clinic set-up and if you hold the SDOB security key.

VA Patient Enrollment System information for the selected patient is displayed while using this option.

Make Appointment

Introduction

If the appointment is made for the current date, the user may be able to issue a request for the patient's records. In order to do this, the Record Tracking package must be running at your site and the selected clinic must be defined in Record Tracking. Dependent on the clinic set-up, you may be allowed to request that previous x-ray results are sent to the clinic for the appointment. The option also provides the ability to view the selected clinic availability chart by entering an up-arrow <^> at the "Select PATIENT NAME" prompt. You may wish to see what slots are available in the clinic before actually enrolling the patient.

If the patient has an appointment on the exact date and time you are booking, you are given the opportunity to cancel the previously scheduled appointment and book the new one. As appointments are made in the clinic, the number of slots available per hour is decreased accordingly. If four slots are available at 8:00 and you book an hour long (60 minutes) appointment, the result would be:

PRIOR TO APP'T	NEXT DISPLAY
8 9	8 9
[4 4 4 4 4 4 4 4	[3 3 3 3 4 4 4 4

Overbooks are represented by ascending letters of the alphabet, and appointments booked for a time a clinic does not usually meet are represented by an asterisk <*>. In the example below, the 9:30 slot has been overbooked once, the 10:00 slot twice and the 11:00 slot shows no appointments left (i.e., if an appointment were to be booked into the 11:00 slot, the next display would show an "A") and one of the 11:00 appointments is scheduled to go 15 minutes into the 12:00 slot, which is not a time the clinic usually meets.

8 9 10 11 12 1
[4 3 3 2 2 2 A A B B 1 1 0 0 0 0]* ...

If a clinic has been inactivated for a given period of time, the day(s) the clinic has been inactivated will not appear in the chart. A message will be displayed to indicate this.

Make Appointment

Introduction

If the appointment time is outside of the normal hours for the clinic and does not occur before the hour that the clinic display begins or ends, and you hold the overbook key, you will be asked if you wish to overbook. If the above conditions are true and you do not hold the overbook key, you will be told that no open slots are available for booking. Otherwise, the system will ask "WHEN??", signifying that this time is not an allowable time to book an appointment.

If the clinic is cancelled only for a portion of a day it is scheduled to meet, this will be represented in the display by "XXXs" printed in the cancelled time slots. The system will alert you with a message if you attempt to schedule during that time. For example, if a clinic meets from 8:00 to 12:00 and the clinic has been cancelled from 11:00 to 12:00, you would see:

```
| 8      | 9      | 10     | 11     | 12     |
| 4 4 4 4 | 4 4 4 4 | 4 4 4 4 | XXXXXX | XXXXXX |
```

Entire days that have been cancelled will appear as follows:

```
| 8      | 9      | 10     | 11     | 12     |
***CANCELLED***
```

To schedule an appointment type of COLLATERAL, EMPLOYEE, or SHARING AGREEMENT requires the patient to be registered with a primary eligibility or other entitled eligibility of COLLATERAL, EMPLOYEE, or SHARING AGREEMENT. If the selected appointment type has subcategories, you will be asked to select the appropriate subcategory. This will also occur in other options where you may make an appointment - Make Consult Appointment, Multiple Appointment Booking, etc.

If you schedule an appointment in the past, depending on how parameters are set at your site, you may be prompted for a checkout date/time, and a checkout interview may be displayed. The checkout interview may prompt for classification, provider, diagnosis, and procedure codes for the selected appointment.

If you enter a past appointment date after 10/1/93 but prior to today, the appointment is automatically checked out. If you enter a past appointment for today (for example, it is now August 1, 1996@0800 and you enter an appointment for T@07:30), you are prompted to select either check in or checkout. It is important to remember that date **and** time are considered when determining whether an appointment is past or future.

Make Appointment**Example****Example 1 - Enroll patient in the X-Ray Clinic.**

```

Select CLINIC:  X-RAY
Select PATIENT NAME:      HANSEN, H          02-03-71      123450101      YES
NSC VETERAN      SMITH, DR. JAY          SMITH, DR. JAY

APPOINTMENT TYPE: REGULAR//  <RET>
DISPLAY PENDING APPOINTMENTS: NO//  <RET>
CURRENT ENROLLMENT:  OPT
DISPLAY CLINIC AVAILABILITY STARTING WHEN:  T (JUL 30, 1997)

                                     X-RAY
                                     JUL 1997

TIME      |8      |9      |10      |11      |12      |1
DATE      |      |      |      |      |      |
WE 30      [1 1 1 0 1 1 | 0 1 1 0 1 1]

                                     AUG 1997
MO 04      [1 1 1 1 1 1 | 1 1 1 1 1 1 | 1 1 1 1 1 1 | 1 1 1 1 1 1]
WE 06      [1 1 1 1 1 1 | 1 1 1 1 1 1]
MO 11      [1 1 1 1 1 1 | 1 1 1 1 1 1 | 1 1 1 1 1 1 | 1 1 1 1 1 1]
WE 13      [1 1 1 1 1 1 | 1 1 1 1 1 1]
MO 18      [1 1 1 1 1 1 | 1 1 1 1 1 1 | 1 1 1 1 1 1 | 1 1 1 1 1 1]
WE 20      [1 1 1 1 1 1 | 1 1 1 1 1 1]
MO 25      [1 1 1 1 1 1 | 1 1 1 1 1 1 | 1 1 1 1 1 1 | 1 1 1 1 1 1]
WE 27      [1 1 1 1 1 1 | 1 1 1 1 1 1]

10 MINUTE APPOINTMENTS
DATE/TIME:  8/27/97@0900 (AUG 27, 1997@09:00)
10-MINUTE APPOINTMENT MADE
WANT PATIENT NOTIFIED OF LAB, X-RAY, OR EKG STOPS? No//  <RET> (No)
OTHER INFO:
WANT PREVIOUS X-RAY RESULTS SENT TO CLINIC? No//  <RET> (No)

Patient is enrolled in the VA Patient Enrollment System...
Enrollment Date      : JUL 30, 1997
Enrollment Status    : UNVERIFIED
Enrollment Priority: 2
Preferred Facility    : HONOLULU OC, HI

Enter RETURN to continue or '^' to exit:  <RET>

Select CLINIC:  <RET>

```

Make Consult Appointment

Introduction

This option allows designated personnel to schedule clinic appointments. This is a clone of the Make Appointment option, except that it allows holders of the SC CONSULT security key to make appointments for patients who are designated as “restrict consults” through PCMM.

Patients are designated as “restrict consults” as a result of the following actions.

- Restrict Consults is checked on the Settings tab of the Team Profile screen for a team to which the patient is assigned.
- Restrict Consults for this Patient is checked during a Patient-Team Assignment.

You will be notified of the team assignments that created this designation. If you continue to make an appointment or enroll the patient in the clinic, a MailMan message will be sent to the applicable team members who chose to receive Consult Notifications.

VA Patient Enrollment System information for the selected patient is displayed while using this option.

If you need further help with this option, please refer to the Make Appointment option in this section.

Example

```
Select CLINIC:  PODIATRY
Select PATIENT NAME:  HANSEN,H          02-03-71      123450101      YES
NSC VETERAN      SMITH,DR. JAY          SMITH,DR. JAY

APPOINTMENT TYPE: REGULAR//  <RET>
DISPLAY PENDING APPOINTMENTS: NO//  <RET>
      PATIENT NOT ENROLLED IN CLINIC!
      WANT TO ENROLL HER IN PODIATRY?  Y  (Yes)
      DATE OF ENROLLMENT: NOW//  <RET>  (JUL 30, 1997@11:34)
      OPT OR AC: ac  AC
DISPLAY CLINIC AVAILABILITY STARTING WHEN:  T  (JUL 30, 1997)
```

Make Consult Appointment

Example

```

                                PODIATRY
                                JUL 1997
TIME | 8 | 9 | 10 | 11 | 12 | 1 | 2 | 3 | 4
DATE | | | | | | | | | |
                                AUG 1997
MO 04 [1] [1] [1] [1]
TU 05 [1] [1] [1] [1] [1] [1] [1] [1]
MO 11 [1] [1] [1] [1]
TU 12 [1] [1] [1] [1] [1] [1] [1] [1]
MO 18 [1] [1] [1] [1]
TU 19 [1] [1] [1] [1] [1] [1] [1] [1]
MO 25 [1] [1] [1] [1]
TU 26 [1] [1] [1] [1] [1] [1] [1] [1]

30 MINUTE APPOINTMENTS
DATE/TIME: 080497@0800 (AUG 04, 1997@08:00)
30-MINUTE APPOINTMENT MADE
WANT PATIENT NOTIFIED OF LAB,X-RAY, OR EKG STOPS? No// <RET> (No)
OTHER INFO:
WANT PREVIOUS X-RAY RESULTS SENT TO CLINIC? No// <RET> (No)

Patient is enrolled in the VA Patient Enrollment System...
Enrollment Date : JUL 30, 1997
Enrollment Status : UNVERIFIED
Enrollment Priority: 2
Preferred Facility : HONOLULU OC, HI

Enter RETURN to continue or '^' to exit: <RET>

Select CLINIC: <RET>

```